

# NC COVID-19 RESPONSE: CVMS Provider Enrollment

This roadmap serves as a guide for new COVID-19 vaccine providers on how to enroll in the COVID-19 Vaccination Provider Program and use the COVID-19 Vaccine Management System (CVMS) to report and manage COVID-19 vaccine administration.

## What is the COVID-19 Vaccine Management System (CVMS)?

CVMS is a secure, cloud-based system that enables COVID-19 vaccine management and data sharing across recipients, care providers, hospitals, and local, state, and federal governments on one common platform. Through CVMS, North Carolina health care providers can:

- Enroll in the COVID-19 Vaccine Program
- Manage COVID-19 vaccine inventory
- Track COVID-19 vaccine administration
- Invite their employees to register for vaccination
- Schedule appointments
- Generate reports

## Before getting started , organizations should:

- Attend a live CVMS Provider Enrollment Training Session ([CVMS Training Schedule](#))
- Review and complete the [Provider Toolkit](#) before step 4 below
- Explore the [Knowledge Base](#)
- Identify someone to be the Organization Administrator responsible for initiating the COVID-19 Vaccination Provider Enrollment Agreement

COVID-19 Program Enrollment can be initiated at <https://covid-enroll.ncdhhs.gov>.

## Key Roles

**Health Care Provider (HCP):** Person who conducts recipient check-in and registers appointments (for locations that have signed up for the scheduling feature in CVMS) as well as administers vaccine and schedules first and second dose

**Health Care Location Manager:** Provider Portal user who can add recipients, record vaccine administrations, manage vaccine inventory, enable and manage CVMS appointment scheduling settings, and manage location details to be visible on Vaccines.gov.

**Vaccine Coordinator (Primary & Back-up):** Person responsible for completing Section B of the CDC COVID-19 Vaccination Provider Enrollment Agreement in CVMS Provider Enrollment Portal. The back-up is the second point of contact after the Primary Vaccine Coordinator for a specific location.

**Organization Administrator:** Person responsible for initiating the provider enrollment process on behalf of an organization and completing Section A of the CDC COVID-19 Vaccination Provider Enrollment Agreement in CVMS Provider Enrollment Portal.

## Your enrollment journey begins here...

### Start COVID-19 Vaccination Provider Enrollment Agreement

A designated Organization Administrator receives email from NCDHHS with the link to the Provider Enrollment (PE) Page or it can be accessed here: <https://covid-enroll.ncdhhs.gov>. Create a username and password for login.

Responsible: Organization Administrator

### Register for an NCID

In preparation for next section of enrollment agreement, all anticipated system users must obtain NCID credentials if they do not already have them. To obtain an NCID , see the [Obtain NCID Credentials](#) user guide and go to <https://ncid.nc.gov>.

Responsible: All Anticipated System Users

### Provider enrollment tasks complete!

### Receive Approval & Welcome Email

Upon approval, an approval email will be sent to the Organization Administrator, Vaccine Coordinators, and CMO & CEO. The first Healthcare Location Manager will automatically be given access and receive a CVMS welcome email with next steps.

Responsible: Vaccine Coordinator, Organization Administrator, CEO & CMO, Healthcare Location Manager

### Add CVMS Users

The initial Healthcare Location Manager will login to the CVMS Provider Portal linked in the welcome email and being to add CVMS users. An NCID will be required for users being added.

Responsible: Health Care Location Manager

### Receive and Manage Vaccine Inventories

CVMS users designated as Health Care Location Managers have access to view and manage vaccine inventories, shipment records, inbound transfers, record deprecation and view user reports.

Responsible: Health Care Location Manager

### Display Locations on Vaccines.gov Website

On the organization tab, the Healthcare Location Manager will enable scheduling and publish appointment slots. Recipients will then be able to self-schedule for appointments through CVMS.

Responsible: Health Care Location Manager

### Enable Self-Scheduling for Appointments (Optional)

The Healthcare Location Manager can submit a ticket on the [CVMS Help Desk Portal](#) to activate the scheduling feature. Once activated, check the “CVMS Scheduling” check box for a location and create two vaccine supply records to publish appointment slots. Recipients will then be able to self-schedule for appointments through CVMS.

Responsible: Health Care Location Manager

### Provide Organization Details

#### CVMS Provider Enrollment Portal – Section A

Organization Administrator will complete Section A by providing details including:

- Organization details
- Details of each location within the organization
- Vaccine Coordinator details for each listed location
- Selection of Provider Type
- CEO and CMO contact information
- Select CVMS during System Selection

Responsible: Organization Administrator

### Register Each Vaccine Location & Complete Agreement

#### Provider Enrollment Portal – Section B

Location Vaccine Coordinators will receive a unique email link to create a login for the CVMS Provider Enrollment Portal and complete Section B. Details include:

- Storage & Handling capabilities
- ALL Healthcare providers at that location who are licensed to authorize the vaccination.
- Identifying first Healthcare Location Manager

CEO and CMO will sign the completed Agreement before submitting.

Responsible: Vaccine Coordinator, CEO & CMO

*Submitted applications undergo an extensive approval process by NCDHHS. Due to high volume of applications, you may have a delay in response. Please allow up to two weeks for a response.*

### Access the CVMS Provider Portal

Users who have been added to CVMS will receive a welcome email to complete their registration and log into the CVMS Provider Portal to begin COVID-19 vaccine management.

Responsible: All Added System Users

*We strongly recommend new CVMS users attend a live training session ([schedule linked here](#)) or review a recorded session.*

### Invite Recipients to Register for COVID-19 Recipient Portal

Individuals who are pre-registered for receiving vaccine through the Recipient Bulk Upload Template will receive an email to complete their registration in the COVID-19 Vaccine Recipient Portal. They will be able to use the portal to see their vaccination status and record.

Responsible: Recipients

*\*If a recipient does not register in advance through the welcome email, they can complete their registration in-person during their appointment.*

### Check-in Recipients and Document Vaccination

During the vaccination appointment, Health Care Providers (or designated person) are responsible for logging a recipient's vaccination within CVMS and providing a proof of vaccination CDC card.

Responsible: Healthcare Location Manager, Health Care Providers

Key: ● CVMS Enrollment/Onboarding ● Preparation Steps ● CVMS Vaccine Management

**Questions?** You can find helpful knowledge articles or submit an inquiry by visiting the [CVMS Help Desk Portal](#). Before you can submit an inquiry, you must register for a CVMS Help Desk Portal account by following the detailed instructions found in the [Provider Help Desk Submission – Process Summary User Guide](#). You can also call the Help Desk at 1-877-873-6247 (Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET).

# Step-by-Step Instructions for CVMS Enrollment

## STEP 1: Start COVID-19 Vaccination Provider Enrollment Agreement

A designated Organization Administrator receives email from NCDHHS with guidance on enrolling their organization in the COVID-19 Vaccination Provider Program. The email will contain a link to the Provider Enrollment (PE) Page. Once navigating to the login page, select Register in the bottom right corner to create a username and password for login.

The COVID-19 Vaccination Provider Enrollment Agreement can also be accessed by going to <https://covid-enroll.ncdhhs.gov>.

**HELPFUL LINKS:** [CVMS User Guides and Recorded Trainings](#)

## Section A

### STEP 2: Provide Organization Details

Organization Administrators will enter the information for the Organization Administrator (Section A) in the CVMS Provider Enrollment Portal by providing the following information:

- Organization details
- Name of the Organization Administrator and contact information
- All location(s) that will administer vaccinations and the onsite Vaccine Coordinator contact information
- Names of Executive Officers (CEO and CMO) and contact information
- Select CVMS during System Selection

**HELPFUL LINKS:**

- [Register Your Organization and Select System User Guide](#)
- [System Selection Considerations](#)

## Preparation Steps

### STEP 3: Register for an NCID

In preparation for next section of enrollment agreement, Section B, all anticipated system users must obtain NCID credentials. If you do not already have one, you will need to self-register for a NCID account in the North Carolina Identity Management portal by following these detailed instructions. Note: You must register using the “Business” account type

Once you receive your authentication email from NCID, you will click the link to activate your account.

Keep your NCIR username and password confidential and never allow others to use them to access NCIR.

**HELPFUL LINKS:** [Obtain NCID Credentials](#)

## Section B

### STEP 4: Register Each Vaccine Location & Complete Agreement

After the Organization Administrator completes Section A, the Vaccine Coordinator will receive an email inviting them to register for the Provider Enrollment Portal by creating a username and password. Once logged in, they will complete Section B for their assigned location(s) with the following details:

- Location address and contact information
- Names of a primary and a back-up Vaccine Coordinator and contact information
- Shipment availability
- Provider type and setting
- Population(s) served
- Storage capacity and storage unit specifications
- List of providers who will administer vaccines, including license numbers with prescriptive authority \*
  - \* For locations with 25 or more practicing providers who will administer the COVID-19 vaccines, you can receive support entering providers into CVMS via the practicing provider bulk upload process: Please use the [Practicing Provider Bulk Upload Template](#) and submit a ticket via the [CVMS helpdesk portal](#). If your location needs assistance with bulk upload, please submit Section B *without* adding providers in CVMS
- Initial Healthcare Location Manager

Once all required fields are completed for Section B, the Vaccine Coordinator will:

- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement
- Review and sign to the Storage and Handling Attestation

Upon completion of Section B, the organization's CEO and CMO will receive a welcome email inviting them to register and access the CVMS Provider Enrollment Portal to:

- Review the submitted organization information
- Approve submitted organization information via e-signature
- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

The CEO and CMO signatures are required at completion of Sections A and B.

Note: If necessary, you have the option to resubmit your Section B as well as review all the information you are submitting one more time. Once you reach the final page of Section B, select your reasons for resubmitting and select Resubmit.

**HELPFUL LINKS:**

- [CVMS Provider Enrollment Portal Complete Storage and Handling Attestation Job Aid](#)
- [CVMS Provider Enrollment Portal Sign a Redistribution Agreement Job Aid](#)
- [Register Each Vaccine Location and All Prescribing Providers Who Will Administer Vaccine User Guide](#)

## STEP 5: Provider Enrollment Tasks Complete!

The provider enrollment tasks have been completed.

Submitted applications undergo an extensive approval process by NCDHHS. Due to high volume of applications, there may be a delay in response. Please allow up to two weeks for a response. You will be notified if your file has been approved, denied or requires additional information.

# Step-by-Step Instructions for CVMS Enrollment

## Preparation Steps

### STEP 6: Receive Approval & Welcome Email

Upon approval, an approval email will be sent to the Organization Administrator, Vaccine Coordinators, and CMO & CEO.

The first Healthcare Location Manager that was identified by the Vaccine Coordinator for each location will automatically be given access to CVMS and will receive a CVMS welcome email with next steps and instructions for adding additional users.

### STEP 7: Add CVMS Users

1. Log into the CVMS Provider Portal using your NCID username and password. Enter the required fields for each new user, including:
  - a. First name and last name
  - b. Email address
  - c. NCID username
  - d. Profile (Drop-down field, select “Health Care Provider – Read Only,” “Health Care Provider” or “Health Care Location Manager”). Health Care Providers administer the vaccine and check in recipients. Health Care Location Managers are responsible for supervising vaccine inventories and uploading recipients for access to CVMS Recipient Portal
2. Each location must be assigned a Health Care Location Manager. A Location Manager can be the same user for multiple locations.
3. Ensure that the first name, last name and email address for the new user matches the information used to register their NCID. Any discrepancies will delay the user from receiving access to CVMS.
4. After clicking save, an email will be sent to the users inviting them to sign in to their CVMS Provider Portal accounts.

**HELPFUL LINKS:** [Create Users Accounts for your Organization's CVMS Users User Guide](#)

## Vaccine Management

### STEP 8: Access the CVMS Provider Portal

Users who have been added to CVMS will receive a welcome email with a unique link to the to complete their registration and log into the CVMS Provider Portal to begin COVID-19 vaccine management.

**It is strongly recommended that new CVMS users attend a live training session ([schedule linked here](#)) or review a recorded session.**

1. On the CVMS Provider Portal log-in page, click the blue NCID button.
2. Enter your NCID username and password to sign in.
3. The Health Care Location Manager and Health Care Provider profiles have different access in the CVMS Provider Portal:

Health Care Location Managers tabs:

- Home
- Recipient
- Appointments
- Bulk Registration
- Vaccine Inventory
- Vaccine Marketplace
- Shipments
- More:
  - Organization Management
  - Help & Information
  - Reports
  - Account Management
  - Files

Health /Care Providers tabs:

- Home
- Recipients
- Appointments
- Help & Information

For users with access to multiple locations, you will need to select a location at each login. To change locations, use the ‘Switch Locations’ button and select another location.

**Note:** There are three reports currently available for Health Care Location Managers:

1. HCP Health Care Roles Report - Lists all users and their roles at the location of the logged-in user.
2. Inventory Summary Report - Provides COVID-19 vaccine inventory at your location.
3. Recipient Vaccination Report - Lists everyone who has a received a vaccination at your location.

### HELPFUL LINKS:

- [CVMS Provider Portal](#)
- [CVMS Provider Portal - HCP Read Only Profile Job Aid](#)
- [Navigate the CVMS Provider Portal User Guide](#)

## STEP 9: Receive and Manage Vaccine Inventories

Users designated as a Health Care Location Manager in the CVMS Provider Portal can receive and process COVID-19 vaccine inventories in the system.

If you are responsible for multiple locations for your organization, you will be able to switch locations within the CVMS Provider Portal to view and manage vaccine inventories for each location.

CDC COVID-19 vaccine guidelines require that you maintain accurate inventory levels for each location you support.

Once the manufacturer starts the shipping process each week, a vaccine shipment record will be created under the *Shipments* tab. You will also receive an email notification when a vaccine shipment is on its way to your location.

1. At the top of your home page, locate and click the *Shipments* tab to navigate to the *Shipments* page.
2. By default, you will see a list view on your page of your recently viewed records. To see all your shipment records, you will have to switch to the “All Shipment Records” list view. You will be able to switch back and forth between list views.
3. The shipment record includes details about your expected order such as date shipped, quantity shipped, tracking information, vaccine lot number, NDC number, expiration date, and the manufacturer name.
4. Primary Vaccine Coordinators will be notified via email from Pfizer, McKesson (Moderna), Johnson & Johnson (Janssen) if a vaccine shipment has been processed for location(s) they support.
5. Please reference the user guides in the Links section below, for detailed instructions on how to complete the following actions relating to vaccine inventories:

**Adding COVID-19 Vaccine Inventory** – When you physically receive a COVID-19 vaccine inventory shipment, you need to add the inventory to your location’s COVID-19 vaccine inventory in CVMS. Processing your COVID-19 vaccine shipments correctly will ensure accurate COVID-19 vaccine inventory reporting to the state.

**Receiving an Inbound Vaccine Transfer** – If you are receiving an inbound transfer from another location, review the inbound transfer page for status updates. When you receive the inbound transfer, process the inventory via the inbound transfer page in CVMS.

**Updating Vaccine Records** – You will be able to update the vaccine inventory record. It is very important to ensure accurate data entry when processing a new COVID-19 vaccine inventory shipment.

**Redistribution** – The planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

**Transfer** – The unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

**Confirm Expiration Dates for COVID-19 Vaccines** – When a Health Care Location Manager at a location receives a COVID-19 vaccine order from the manufacturer, they should confirm the expiration date for the vaccine lot is entered correctly in the CVMS Provider Portal.

**Documenting Insufficient Quantities** – Process for reporting any time when less than the CDC standard doses are extracted or obtained from a vial of a specific vaccine manufacturer. Insufficient quantities can be documented for any COVID-19 Vaccine Product.

**Vaccine Marketplace** – If you have a surplus of COVID-19 vaccine doses or if you need additional COVID-19 vaccine doses, use the Vaccine Marketplace to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

**Hub** – Hubs are locations contracted by NCDHHS to serve as COVID-19 vaccine repositories. Hubs consolidate vaccine inventories that are dispersed among multiple providers.

### HELPFUL LINKS:

- [CVMS Provider Portal Accounting for Extra Doses in the Vaccine Inventory Job Aid](#)
- [CVMS Provider Portal Offer Vaccine Through Vaccine Marketplace Job Aid](#)
- [CVMS Provider Portal Request Vaccine Through Vaccine Marketplace Job Aid](#)
- [CVMS Provider Portal Documenting Insufficient Quantities](#)
- [CVMS Provider Portal State Sponsored Contract Vaccine Inventory Job Aid](#)
- [CVMS Provider Portal Inventory Transfers to Providers Not Using CVMS Job Aid](#)
- [CVMS Provider Portal COVID-19 Vaccine Expiration Date Job Aid](#)
- [Receive and Manage Vaccine Inventories User Guide](#)

## STEP 10: Display Locations on Vaccines.gov Website

1. To display your vaccination sites on the CDC’s [Vaccines.gov](#) Vaccine Site Locator website, the Health Care Location Manager will log in to the CVMS Provider Portal using their NCID username and password.
2. Navigate to the Locations tab and click on the location name you wish to add to the Vaccine Site Locator website.
3. Enter your vaccination location information and then select “Yes” under “Display on Vaccine Site Locator” to add your site to the CDC’s Vaccine Site Locator website if your location provides COVID-19 vaccines to the general public. Click "SAVE" once you are ready to publish the location.

### HELPFUL LINKS:

- [CVMS Provider Portal Display a New Community Vaccination Event Location on the Vaccine Site Locator Website Job Aid](#)
- [CVMS Display on Vaccine Site Locator One Pager](#)
- [Add Locations to the Find a Vaccine Location Website User Guide](#)

STEP 11: Invite Recipients to Register for CVMS Recipient Portal

If you a have a large number of vaccine recipients that need to register in the CVMS, use the Recipient Bulk Upload Template to add them. It is helpful to have recipients register in the CVMS prior to their appointment because it significantly cuts down the check-in process for Healthcare Providers on the day of the appointment.

1. Complete the Recipient Bulk Upload Template by entering the following information in the template:
- a. Employee/Recipient First Name

b. Employee/Recipient Last Name

c. Employee/Recipient Email Address
2. Submitting the Recipient Bulk Upload Template:
- a. Upload the completed Recipient Bulk Upload File by navigating to the Bulk Registration tab in the CVMS Provider Portal.

b. View uploaded recipient records for completeness and accuracy. If you find errors or missing information, click cancel to remove the file and edit.

c. If the data is correct, click Create Records.

d. Once upload is complete, you will receive an alert message stating the number of successful recipient uploads and the number of failed.

e. Once you click OK, the recipients who were successfully uploaded will receive an email with instructions on how to complete their account setup and register in the COVID-19 Vaccine Portal.

f. If there were errors in the recipients’ information that caused a failure in uploading, you will receive an email with the attachment that contains the failed records and the reason for failure.

g. Correct the errors in the same file based on the failure reason and re-upload the file in the Bulk Registration tab. Recipients without an email address can be registered on-site in the CVMS and receive the vaccine.

HELPFUL LINKS:

- [Recipient Bulk Upload Template](#)

• [Invite Recipients to Register in the COVID-19 Vaccine Portal User Guide](#)

STEP 12: Enable Self-Scheduling for Appointments (Optional)

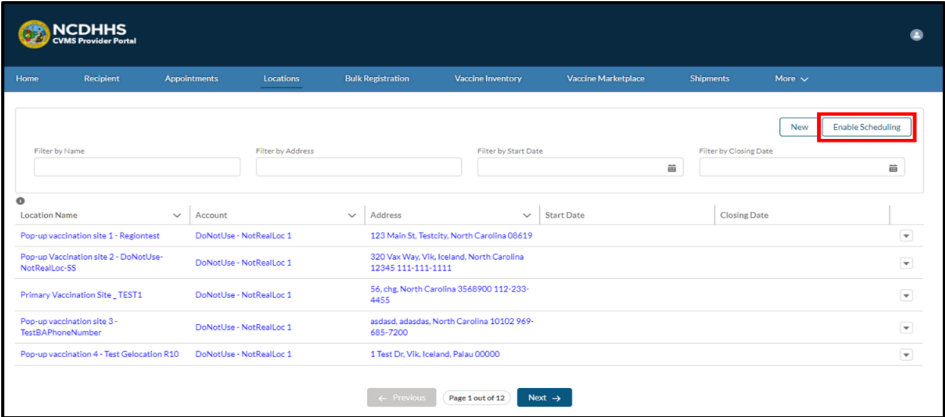
To allow recipients to self-schedule, the Healthcare Location Manager will enable scheduling for their designated locations and invite recipients to self-schedule.

Enable Scheduling

1. Navigate to the Locations tab
2. Click on the button Enable Scheduling at the top right corner
3. Select the vaccination site location name you want to enable the self-scheduling feature for
4. Complete the attestation questions
5. Click Save

Enter site details

1. Navigate to the Locations tab
2. Select a site to Edit then click Next
3. Go to the Details tab and click Edit in the top right corner
4. Enter the site details
5. Check the “CVMS Scheduling” box
6. Enter a Start Date and a Closing date to indicate when people would be able to self-schedule their first dose or their additional dose/booster.
7. Click save.



The first time you use the scheduling feature for a location, you’ll need to create two vaccine (appointment) supply records. To learn how to create the two initial vaccine supply records, please reference the CVMS Provider Portal Manage Appointment Scheduling User Guide.

Create two vaccine (appointment) supply records for first and second dose appointments

1. Click on the Related tab
2. Click Edit on the 1st dose Vaccine (Appointment) Supply record
3. Set the Current Stock to be the number of 1st dose appointments to release
4. Click Save
5. Click Edit on the 2nd dose Vaccine (Appointment) Supply record
6. Set the Current Stock to be a very large number (e.g., 1,000,000)
7. Click Save
8. Click Edit on the Additional / Booster Vaccine (Appointment) Supply record
9. Set the Current Stock to the number of Additional Dose / Booster appointments to release
10. Click Save
11. Click on the Availability tab
12. Update the opening hours & capacity
- a. Indicate days that will have appointments and operating hours

b. Enter the number of appointments per time window. This is the number of appointments that can happen at the same time.

c. Enter the time window duration. This is the appointment length.

Set your schedule

1. Click the availability tab and enter the:
- a. Time window duration - how long it takes for a vaccine administration, generally around 10 to 15 minutes

b. Start and closing dates - recipients will be able to select an appointment slot

c. Days and hours of operation

d. Number of appointments per time window - how many people can be vaccinated at the same time
2. Click Save.

Day	Opening hours	Time window duration (mins)	Appointments per time window	Total appointments	
<input checked="" type="checkbox"/> MON	<div>08:00 A...12:00 P...</div> <div>12:45 P...05:00 P...</div>	<div>15</div> <div>15</div>	<div>2</div> <div>2</div>	<div>32</div> <div>34</div>	<div>Actions</div> <div>Actions</div>
<input type="checkbox"/> TUE	Unavailable				
<input type="checkbox"/> WED	Unavailable				
<input type="checkbox"/> THU	Unavailable				
<input type="checkbox"/> FRI	Unavailable				
<input type="checkbox"/> SAT	Unavailable				
<input type="checkbox"/> SUN	Unavailable				

Cancel

Save



Set the maximum number of appointments

1. Click the Related tab
2. Open the Dose 1 Generic Vaccine Supply Record and in the Current Stock section add the maximum number of appointment slots you wish to release
3. Open the Dose 2 Generic Vaccine Supply Record and in the Current Stock section, enter a very large number, so you would not need to update this number anymore. As these appointments are booked by your own team at the 1st dose vaccine administration visit, there is no real need at limit the number of appointments to avoid overbooking
4. Open the Additional/Booster dose Vaccine Supply Record and in the Current Stock field enter the number of appointments to release

You should only release the number of First Dose and Additional Dose/Booster appointments that you know your location can handle, and add to this number frequently as you reach the maximum number set

You should only increase this current stock number and never reduce it, as it represents the maximum number of appointments released since you began using the feature. If your current stock is less than number of appointments already booked, then people will not see any availability at your location for a dose 1 or an additional dose/booster appointment.

Publish your appointments

1. Click the Related button
2. Open the Dose 1 Vaccine Supply Record
3. In the Current Stock section add the number of appointment slots you wish to release (Make sure this adds up to the current vaccine stock. Do not update the Date of Stock Count.)

HELPFUL LINKS:

- [How to Use Scheduling in CVMS](#)
- [Invite Recipients to Self-schedule Their Appointments \(Optional\) User Guide](#)

Edit SUP-00269

Name

SUP-00269

Vaccine

VAX-0001

Current Stock

1,000,000

Date of Stock Count

7/8/2021

Location

Primary Vaccination Site\_TEST1

Vaccine Brand

Generic

Dose Number

2

System Information

Created By

Revathy Rangan, 7/8/2021, 6:29 AM

Last Modified By

Revathy Rangan, 7/8/2021, 6:29 AM

Owner

Revathy Rangan

Cancel

Save

STEP 13: Check-In Recipients and Document Vaccination

1a) Search for a recipient in CVMS Provider Portal.

- If a recipient is already registered in the CVMS you will be able to locate their record and view their information.
- If errors were flagged on the registered recipient's Registration Form or it is incomplete, correct the information with the recipient's help. (Note: Only a Health Care Location Manager profile can update a recipient's registration data.)

**NOTE 1:** If you encounter one of the following scenarios while searching for a recipient in CVMS, proceed to step 1b to complete the point of care registration.

- Recipient was not located in the system
- Recipient was invited, but has not completed registration
- Recipient received their first dose vaccination at a Long-term Care Facility and was not logged or registered in the CVMS

**NOTE 2:** If your location is using the scheduling feature in the CVMS, there are three methods to check in a recipient:

- Method 1: Under today's appointment, click on the recipient's name to begin vaccine administration.
- Method 2: Enter the appointment confirmation number under the Recipient Check In tool and click Go.
- Method 3: On the Appointments tab, identify the correct appointment booking for the recipient and click on the drop- down arrow to the right of their name to select Check in.

1b) Point of care process for unregistered recipients

Assign staff to help with recipient onsite registration. They will need to create a recipient record within the CVMS Provider Portal for any unregistered recipients.

- 1.On the Recipient tab, click Create New Recipient
- 2.Enter in the recipient's personal information including their email address if they have one.

For recipients with a mobile phone and email address, once personal information has been submitted in the CVMS Provider Portal, the recipient will receive an email inviting them to complete their registration via the mobile friendly CVMS Provider Portal.

For recipients who do not have access to a mobile phone or an email address:

- 1.Go to the Help & Information tab and download the COVID-19 Registration Form
- 2.Print the document and have the recipient physically complete. A staff person will then need to carefully enter the information from the form into the CVMS Provider Portal.

Complete this process with the recipient present. If something is entered incorrectly, you will need to have a Health Care Location Manager update the recipient's registration information, or have the recipient make the change via the COVID-19 Vaccine Portal (formerly CVMS Recipient Portal).

2) Confirm recipient identity and vaccine eligibility

Confirm registered recipient is eligible to receive the vaccine. As of November 2, all individuals 5 years of age and older are eligible to receive a COVID-19 vaccine in North Carolina. The Pfizer vaccine is approved for individuals ages 5 and older, while the Moderna and Johnson & Johnson vaccines are approved for adults 18 and older.

The state of North Carolina does not require proof of identity, photo ID, Social Security Number or proof of insurance to proceed with vaccination. U.S. citizenship is not required.

3) HCP locates recipient record and receives consent

The HCP searches for the recipient in the CVMS Provider Portal by their name, date of birth or email address.

The HCP discusses vaccination with the recipient who will need to give verbal or written consent to receive a COVID-19 vaccination. Consent may be verbal, except written consent from a parent or legal guardian is required for a minor to receive a vaccine that is under emergency use authorization for the minor's age group. Administering healthcare providers must provide an approved Emergency Use Authorization (EUA) Fact Sheet as required to each vaccine recipient, the adult caregiver accompanying the recipient, or other legal representative. The HCP records that they have received the recipient's consent in the CVMS.

4) **HCP administers COVID-19 vaccine**

The HCP administers the vaccine and captures details in the CVMS:

- a. Injection site
- b. Dose (first, second, or additional dose/booster)
- c. Route - intramuscular (IM) or subcutaneous (SQ)
- d. Date and time of dose
- e. Vial barcode
- f. Vaccine product
- g. Recipient notes (if applicable)
- h. On behalf of clinician statement, if applicable

Please review information for accuracy before submitting.

5) **Schedule the second dose appointment**

Share when the recipient will need to get a second dose, if applicable, and schedule the second dose appointment and share it with the recipient.

**NOTE:** If your location is using the scheduling feature in CVMS, you can:

- Navigate to the Vaccine Administration summary page, click on “Book Second Dose”
- Or navigate to the Appointment tab, search for the recipient, and click on the toggle at the end of the row and select “Schedule Second Dose”

From there:

- Select a date and a time
- Click on Complete Appointment
- The recipient will be notified by email or by text message if they selected to receive notifications this way for the first dose appointment

6) **HCP reviews post-vaccine reminders with recipient**

At the end of the appointment, the HCP will:

- Provide CDC COVID-19 vaccination card to recipient
- Print and provide the CDC COVID-19 Vaccination Record from the CVMS if needed
- Review v-safe information
- Share timing requirements for second dose
- Schedule second dose appointment

Recipients can view their vaccination status and re-print their vaccine information from the COVID-19 Vaccine Portal (formerly CVMS Recipient Portal) by going to My dashboard > COVID-19 Vaccination Information.

For recipients without email addresses, click “Generate Vaccine Information PDF” and print the PDF or assist them in taking a screenshot of the PDF with their phone.

7) **Remove Vaccine Administration Records after Submission**

When a healthcare provider enters Vaccine Administration details erroneously and the Vaccine Administration needs to be completely cleared from CVMS, remove the Vaccine Administration details:

- Navigate to the Recipient tab and locate the recipient
- From the Related tab, select the appointment record you wish to remove and click “Remove this Administration”
- Select a required “Removal Reason” from the drop-down list
- Click “Confirm” and then “Save”

8) **Enter an Additional Dose/Booster Administration**

When selecting which dose the recipient is receiving, you have the option of choosing **Additional Dose/Booster**. This option should be used when a recipient is getting any administration of a COVID-19 vaccine after their initial vaccination (2 doses for Pfizer-BioNTech and Moderna, 1 dose for Janssen). You will select Dose 2 for booster after the initial Janssen.

**CVMS automatic notifications** – Recipients will receive two second dose reminder notifications:

- First reminder: 24 hours after first dose
- Second reminder: One week after first dose

Recipients will receive a physical vaccination card and can also view their vaccine information via the COVID-19 Vaccine Portal (previously the CVMS Recipient Portal).

Emails from [vaccineinfo@dhhs.nc.gov](mailto:vaccineinfo@dhhs.nc.gov): Communications will be shared regarding CVMS enhancement updates, planned outages, training event invitations and information about new user guides and video demonstrations.

HELPFUL LINKS:

- [Recipient Registration and COVID-19 Vaccine Administration Form](#) (English)
- [Recipient Registration and COVID-19 Vaccine Administration Form](#) (Spanish)
- [Vaccine Administrations for Recipients that Received First Dose Through a Long-Term Care Pharmacy Partner](#)
- [Check-in Recipients and Document Vaccination](#)